



Montana WIC Program Retailer Educational Buy/Monitoring Visit for Peer Groups 3 & Supercenters

Store Name: _____ **WIC Stamp Number:** _____

Date of store visit: _____

Manager Name: _____ **WIC Contact Person:** _____
(Please update if needed)

Store Address: _____

City/Zip: _____ **Phone:** _____

Step 1: Ensure that the State Office has sent benefits – with a valid date range – to use during the educational buy.

Step 2: Call ahead! Schedule a time with the store’s manager to discuss the training topics as well as complete the educational buy. Visit the store during low-volume hours to give yourself and store staff more time to focus.

Step 3: AREAS TO MONITOR

The areas below must be in compliance at all times. If at any time these requirements are not met, the store must fix the issue as soon as possible.

- ✓ If you see something out of compliance but can fix it, do so. Check “OK” and put “Fixed on-site” in the comments section.
- ✓ Make sure to comment if something is out of compliance.

Areas to monitor:	OK	Out of compliance	Does not apply	Comments
“We Accept WIC” sign posted				
Clean & sanitary conditions in store				
Current dates on foods				
Prices identified on shelf or item				
Accurate use of shelf tags				
Stocking exemption sign posted (if applicable)				

Step 4: CHECK MINIMUM WIC STOCKING REQUIREMENTS

Conduct an on-site inventory to ensure that the retailer has sufficient quantities of WIC approved items to meet participant demand. Quantities are based on the amounts needed to fill a benefit for one pregnant woman, one infant, and one child. **If the store does not meet minimum requirements in any area, comment on the deficiency, and ask the store to order the missing items immediately. Notify the state office after the visit, and return to the store within 30 days to verify the items have been stocked.**

Refer to the Approved Food List for authorized brands/types.

Food Item	Minimum Requirements	Y/N	Comments
Milk Reduced fat (skim or 1% - choose one) and Whole	3 gallons of reduced fat		
	3 gallons of whole		
	3 half-gallons of reduced fat		
	3 half-gallons of whole		
Cheese 16 or 8 oz packages	3 – 16 oz packages of two flavor varieties OR		
	6 – 8 oz packages of two flavor varieties		
Eggs dozens only	3 dozen		
Breakfast Cereal 12-oz packages or larger cold cereal AND 12 – 11 oz packages hot cereal	2 boxes of three varieties cold AND		
	2 boxes of one variety hot (one of the cold or hot varieties must be whole grain)		
Whole Grain Items 16 oz loaves whole wheat bread AND 16 - 15 oz packages brown rice and/or 14-16 oz. instant rice	3 loaves of bread AND		
	3 packages of regular or quick/minute brown rice		
Juices 12 - 11.5 oz frozen AND 64 oz plastic bottles	3 cans of two different flavors – frozen AND		
	3 bottles of two different flavors - bottled		

Peanut Butter 18 - 16 oz jars	3 jars		
Legumes (mature beans) 16 oz bags dry AND 16 - 15 oz canned legumes	3 packages of two varieties – dry AND 10 cans of two varieties - canned		
Canned Fish 6 - 5 oz cans	6 cans of light tuna AND 6 cans of pink salmon		
Infant Cereal 8-oz boxes	2 boxes of two different grain varieties		
Infant Foods Fruits, 4 oz jars, Stage 2 only AND Vegetables, 4 oz jars, Stage 2 only AND Meats, 2.5 oz jars	20 jars of fruits and vegetables including two flavors of fruits and two flavors of vegetables AND 10 jars of baby food meat		
Infant Formula Powdered format required in size specified Similac Advance – 12.4 oz. AND Gerber Good Start Soy – 12.9 oz	6 cans of each variety 6 cans of each variety		
Fresh Fruits and Vegetables	2 different varieties of fresh fruits AND 2 different varieties of fresh vegetables		

Step 5: REVIEW OF BENEFIT TRANSACTION PROCESS

Use an educational buy benefit to conduct a transaction in order to verify the redemption process/procedures are being followed correctly.

- ✓ You may inform the cashier that this is an educational buy BEFORE it begins so he/she knows that the transaction will not be processed.
- ✓ This is an educational buy! The goal of the “transaction” is not to penalize the retailer but to identify areas for further education.

Benefit #: _____ Valid Dates: _____ to _____

Benefit Redemption Procedure	OK	Out of compliance	Comments
Food list at register			
ID packet checked at register			
Cost entered before signature			
Benefit signed after amount purchased			
Signatures compared			
Provide itemized receipt			
Did not give or request change with transaction			
Redeemed benefit for non-WIC item(s)			
Authorized brands purchased			
Unauthorized amounts purchased			
No discourteous treatment observed			

Step 6: REVIEW OF REDEEMED BENEFITS

Ask a manager or store representative to review any WIC benefits currently in any of their cash registers. If you encounter any issues with the benefits on hand, explain how to fix the issue (refer to the Benefit Processing Guide). **Remind the representative that if they ever have questions about a benefit, it can save them money to call before deposit rather than after it.**

- ☐ Missing Signature
- ☐ Missing Amount of Sale
- ☐ Altered Amount of Sale
- ☐ Missing Date of Use
- ☐ Used outside of valid date range
- ☐ No benefits on hand to review
- ☐ Other issues:

Step 7: ASK A MANAGER TO DESCRIBE THEIR TRAINING SYSTEM FOR NEW HIRES AND CURRENT STAFF.

ASK IF THEY USE:

- ☐ Online Cashier Training Modules
- ☐ Retailer Program Booklet
- ☐ Retailer Reference Manual
- ☐ Personalized Training

Are there any training needs? Y or N (explain):

Does the manager share the information in the Montana WIC Retailer Newsletter with all staff? Y or N

*If they do not, explain the newsletter contains the most up-to-date information about WIC, including redemption procedures; this could result in returned benefits which cost the retailer money.

Step 8: INTERACTIVE TRAINING

USDA requires that the following topics be covered during training. This outline of mandatory topics provides information on each area and supporting materials and information have also been included. **Please have the manager/store representative initial beside each topic to verify it was covered.**

—Purpose of the MT WIC Program

- For 40 years, the Special Supplemental Nutrition Program for Women, Infants and Children (WIC) has been an integral part of Montana's public health system. Promoting healthy habits early, when they make the most powerful difference in the lifelong health of a child, is what WIC is all about. With each new eligible family WIC reaches, public health grows stronger and more effective in the fight against obesity and other debilitating and life threatening conditions. The Montana WIC Program serves about 20,000 participants each year.

—WIC Transaction/Redemption Procedure

- Review benefit redemption procedures
- Use packet to help guide you through the process

—WIC Foods Authorized in Montana

- Review the Approved Food List
- Review allowed size substitutions

- the participant MAY get one 16-oz container of infant cereal in place of two 8-oz containers
- the participant MAY get two half-gallons of milk in place of one gallon of milk
- the participant MAY get one 8-quart box of powdered milk in place of three 3-quart boxes
- the participant MAY get two 8-oz packages of cheese in place of a one 16-oz package

—Minimum Variety and Quantity of Stocking Requirements

- Retailers are required to stock certain authorized items at all times in sufficient quantities to meet Participant demand. Specific Montana WIC-authorized brands and sizes for WIC foods are

as defined in the Montana WIC *Approved Food List* (Food List) and as shown on the WIC benefit. Your store's role in ensuring WIC participants receive only the food prescribed for them is **vital**.

- Review Minimum Stocking Requirements if violation involves stocking issues.
- All infant formula must be purchased from a vendor on the Montana WIC Infant Formula Wholesalers/Distributors/Retailers/Manufacturers list, which is located on the Montana WIC website.

—Special Circumstances

- Problems may occur during a WIC transaction. Often, the problems arise from participant or cashier error. Most of these problems can be resolved by referring to the WIC benefit, the Montana WIC Approved Food List, or the participant's WIC ID Packet. The retail staff's high level of customer service ensures that each situation is handled with respect.
- On occasion, a Montana WIC participant may violate WIC Program requirements. If the retailer cannot resolve the conflict by informing the participant of the proper WIC procedures, then the retailer needs to report the incident on a *Participant Complaint Form*. Please complete the form with all relevant information. If possible provide the participant's name and ID number and as many details of the incident as possible as this will aid in the discussion with the participant at the clinic. WIC participants are not permitted to cause a disturbance in your store, abuse your employees or violate the procedures for redeeming benefits.

—Violations and Sanctions

- WIC has a system of sanctions to ensure that WIC customers receive the correct nutritious foods prescribed for them. WIC-authorized stores, as well as WIC customers, may be sanctioned if found to have committed violations abusing the Program.
- Store violations are detailed in the Retailer Reference Manual. Store sanctions range from nonpayment of a WIC benefit to disqualification from the program. The main store violations to keep in mind are:

- Not training store staff on foods and policies,
- Accepting unapproved food items, and
- Not allowing the purchase of approved items.

—Use of Incentive Items

- WIC-authorized vendors may not treat WIC customers differently from non-WIC customers by excluding them from in-store promotions—this includes disallowing the use of coupons or other vendor discounts in WIC transactions that are allowed in non-WIC transactions. Similarly, WIC-authorized vendors may not treat WIC customers differently by offering them incentive items, vendor discounts, coupons or other promotions that are not offered to non-WIC customers.
- Failure to provide the same courtesies to WIC participants, as outlined above, is a violation of Federal WIC Regulations, thereby constituting a vendor violation.

—Resources available if you have a question about WIC

- The MT WIC Approved Food List (online)
- The physical WIC benefit redeemed
- The Benefit Redemption Guide (packet, Retailer Reference Manual (online))
- Your local WIC contact – The Local Agency Retailer Coordinator
- The State WIC office Retail Services staff (1-800-433-4298, option 2)

- **Other Issues**
 - Discuss any other questions or items.

Step 9: RECORD ANY LARC AND/OR RETAILER COMMENTS BELOW:

LARC Comments:

Retailer Comments:

Step 10: SIGN THIS REPORT

I attest that this Montana WIC Program retailer monitoring visit and interactive training occurred.

Name and Signature of WIC Staff

_____ **Date:** _____

Name and Signature of Store Personnel

_____ **Date:** _____

(Note: The store and LARC will receive a copy of this form from the Montana WIC Program.)